

# ConCERTO LOGON Manager

## User's Manual

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ConCERTO LOGON Manager  
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## 1 OVERVIEW

The ConCERTO Logon Manager software stores user names and passwords and facilitates logon to Windows, networks, websites, and applications.

ConCERTO LOGON can be used with the following types of ID tokens:

| Token type                                                    | Description                                                                                                                     | ConCERTO LOGON data storage                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DESFire EV1 card or token<br>(less than 4 kByte data storage) | Typically used for building access, the chip is hidden inside of the card plastic and detected via radio frequency / proximity. | When used in "server mode", ConCERTO LOGON stores cardholder data on a secure server. Data is always transferred in encrypted form, and communication with the server can additionally be protected via SSL.<br><br><u>or</u><br>Can also be used in "standalone mode", where data is stored on a local computer, if for some reason a secure server is not an option. This mode should be an option only for installations in secure environments. |
| DESFire EV1 card or token<br>(4+ kByte data storage)          | Hidden chip is detected via radio frequency / proximity.                                                                        | ConCERTO LOGON stores cardholder data in encrypted form on the chip, providing a high level of security and portability.                                                                                                                                                                                                                                                                                                                            |

Logon data which is stored in the ConCERTO LOGON program can only be accessed when cardholder presents card to card reader and enters ConCERTO LOGON card PIN. When ConCERTO LOGON is used with a fingerprint reader, the fingerprint authentication replaces, or is used in addition to, PIN entry.

Note: For the purposes of this manual, all ID tokens will be referred to as "cards" and ConCERTO LOGON users will be referred to as "cardholders".

\* \* \*

Cardholders use the ConCERTO LOGON program to assist with logon processes:

### To logon to Windows or networks

- Cardholder enters Windows/network user name, password, and domain name into ConCERTO LOGON Manager Program, as prompted by default upon first use.
- The next time the cardholder reboots, cardholder will be prompted to present card to card reader and enter card PIN. ConCERTO LOGON transparently transfers user name, password, and domain to the Windows logon process when user is logged on.

### To logon to websites or applications

- Cardholder uses ConCERTO LOGON to "record" logon information for a website or application. The next time the cardholder goes to the logon location, ConCERTO LOGON automatically fills in the logon information and completes logon.
- Or, cardholder can change the logon settings, to assert more control over the logon process.

ConCERTO LOGON also stores personal information, such as addresses, email, and credit card information. This information can be easily "dragged" from the ConCERTO LOGON program and "dropped" into a website / application entry field.

## 2 GETTING STARTED

This section provides basic information to get cardholders started with the ConCERTO LOGON Manager, including installing and opening the ConCERTO LOGON program, accomplishing initial settings, saving data, and exiting the program.

Refer to the individual sections for detailed information on individual ConCERTO LOGON Manager Program functions.

### 2.1 Installing ConCERTO LOGON

Install the ConCERTO LOGON Manager software, using the following instructions:

#### 1. Verify Browser

Internet Explorer 5.5+ is required for ConCERTO LOGON operation. You can download Internet Explorer 5.5 at [www.microsoft.com](http://www.microsoft.com).

#### 2. Verify Card Reader

A SCM Microsystems card reader is required for ConCERTO LOGON operation. Attach your card reader to an available USB plug on your computer, and install the card reader driver from the ConCERTO LOGON CD, or as directed by the manufacturer. Or, contact your ConCERTO LOGON program administrator to verify installation.

#### 3. Install ConCERTO LOGON

Install the ConCERTO LOGON Manager software from the installation options menu on the ConCERTO LOGON CD.

Or, go online to <http://support.scmmicro.com/ConCERTO> to download the ConCERTO LOGON Manager software.

Click on Download option to download ConCERTO LOGON to your computer. ConCERTOLogonManager\_Setup.exe will be saved under C:\tmp, unless you specify another location.

Double-click on ConCERTOLogonManager\_Setup.exe, to begin installation. The install wizard will guide you through the installation process.

#### 4. Configure Card Reader

After the card reader driver and the ConCERTO LOGON software have been successfully installed, choose your card and card reader from the list of available readers.

Select ConCERTO LOGON Manager from "Start" menu at bottom left of screen ("Programs" option). Click on "ConCERTO Card and Reader Configuration" and select card and reader type.

Note that if at any time you change your card reader type, you must change your selection in the ConCERTO Card and Reader Configuration window. Ensure that ConCERTO LOGON is not currently running when changing this configuration.

If you are not sure which card and reader to select please contact your administrator.

#### 5. Configure Security Settings (2003 server only)

Windows 2003 Server SP1 comes pre-configured with the "Internet Explorer Enhanced Security Configuration" activated. This setting is not compatible with the Auto-record and Auto-fill functions of ConCERTO LOGON Manager and must be disabled prior to running ConCERTO LOGON Manager. Make sure that turning off the "Internet

Explorer Enhanced Security Configuration" setting does not compromise any applicable security policy.

To disable "Internet Explorer Enhanced Security Configuration", perform the following steps:

- In "Control Panel", double-click on "Add/Remove Programs".
- Click on "Add/Remove Windows Components".
- Unselect "Internet Explorer Enhanced Security Configuration".

## 2.2 Opening the ConCERTO LOGON Program

After the ConCERTO LOGON Manager Software has been installed on your computer, use the instructions provided below to open the ConCERTO LOGON program for the first time.

1. Click on the ConCERTO LOGON icon on your desktop, or select ConCERTO LOGON from the "Start" menu at the bottom left of your screen ("Programs" option).

If the ConCERTO LOGON program has been preset to automatically start when your computer is powered up (see "Settings" menu), the program will start automatically.

At the "ConCERTO Card and Reader Configuration" window, select the option that corresponds to the type of card and operating mode that you want to use ("on card mode", "server mode" ...), and the corresponding card reader and click on OK. You only need to make this selection the first time that you use ConCERTO LOGON; the next time you open ConCERTO LOGON the program will default to the selection that you specified.

If you are unsure of which option to select, refer to your ConCERTO LOGON reseller, to ensure the best use of the card and reader which you purchased for your installation needs.

If the card reader which you want to use is not displayed, verify that the desired card reader has been installed, as described on the previous page.

Under "Enable selectable operating modes", select all operating modes that will be used at this installation, and specify which mode should be the default. The operating modes which are enabled will be displayed and selectable upon ConCERTO LOGON Manager Program start.

Note that this screen can also be called from Start > All Programs > ConCERTO LOGON Manager > Card and Reader Configuration. Be aware that card and reader configuration cannot be changed after logging on to computer with a card. In order for the options to be selectable, you must logon to the computer manually.

Refer to the table below for more information about the operating modes.

**Operating mode selection table:**

| Selection     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| On card       | <ul style="list-style-type: none"><li>Select for smart card used in "on card mode", where data is stored on the card.</li></ul>                                                                                                                                                                                                                                                                                                                                                                        |
| Server        | <ul style="list-style-type: none"><li>Select for ConCERTO cards used in "server mode", where data is stored on the secure server.</li></ul>                                                                                                                                                                                                                                                                                                                                                            |
| Laptop        | <ul style="list-style-type: none"><li>Laptop mode for ConCERTO LOGON Enterprise installations: functions without a card or card reader, or with a card reader, as specified by installation.</li><li>Enables user to access ConCERTO LOGON data on laptop, when away from office.</li><li>To save data to Laptop Mode: user logs on to network with laptop and chooses Server Mode, and saves data to laptop.</li><li>Refer to User's Manual for additional information.</li></ul>                     |
| Standalone    | <ul style="list-style-type: none"><li>Select for RFID card used in "standalone mode", where data is stored on the local computer.</li><li>Note that this mode should only be selected if for some reason "server mode" is not an option. It is recommended that this mode should be selected only if your installation is in a secure environment.</li><li>User chooses this selection to use ConCERTO LOGON software with the card and card reader displayed.</li></ul>                               |
| Remote Access | <ul style="list-style-type: none"><li>Enables user to access ConCERTO LOGON data on secure server, without a card or card reader, when away from office.</li><li>For security reasons, only available when user requests that ConCERTO LOGON Administrator temporarily enable this capability - for example, if user forgot to load ConCERTO LOGON data to laptop before leaving headquarters.</li><li>Only available if PC is linked to an uninterrupted internet connection (not dial-up).</li></ul> |
| Demo          | <ul style="list-style-type: none"><li>Demo mode: functions without a card.</li><li>Enables user to preview the ConCERTO LOGON software without a card and without having to attach a card reader.</li><li>In this mode, PIN cannot be changed and only limited logon entries may be used.</li></ul>                                                                                                                                                                                                    |

2. Present your card to the card reader as prompted by the ConCERTO LOGON window. (If you did not receive a card, contact your program administrator.)
3. Type in your ConCERTO LOGON card PIN, and click on the OK button. Type in the initial default PIN (Personal Identification Number), "12345", if you have not been assigned a PIN.

## 2.3 ConCERTO LOGON Self Enrollment

If your card has not yet been registered with the ConCERTO LOGON program, you will be prompted to self enroll. Self enrollment can be performed for both Enterprise installations and Standalone installations, as described below.

### 2.3.1 Enterprise installations

To self enroll for ConCERTO LOGON use at a ConCERTO LOGON Enterprise installation; enter your personal information in all open fields. The requirements of your individual installation will determine which fields you will be required to enter.

1. Enter your First Name, Middle Initial, and Last Name into the entry fields provided.
2. Enter the Employee/Student ID provided to you by your organization (typically displayed on your paycheck, for example). Or, if your organization has specified that you use a different identifier, enter this ID number. This number must be a unique number within your organization.

Note that all information entered on this form stays within your organization, and is not made available to the manufacturer or other entities outside of your organization.

3. Enter your Windows/ConCERTO LOGON User Name. Or if your organization has specified that you should use a different identifier, enter this. This Windows User Name/ConCERTO LOGON User Name will be required if your organization uses the self enrollment process to automatically create a Windows logon entry for your card. Or, it will also be required in order to access your ConCERTO LOGON data in Laptop Mode, if your organization allows the use of Laptop Mode without a card and card reader.

If you do not enter anything in this field and find that you need to use Laptop Mode at a later time, note that the Employee ID entered in the field above will be taken as a default for this field if no entry is present in the ConCERTO LOGON User Name field.

4. Enter your Windows logon password. This will enable ConCERTO LOGON to automatically create a Windows logon entry for you so that the next time you logon to Windows you will be prompted to present the card in order to logon.

### 2.3.2 Standalone installations

When ConCERTO LOGON Standalone versions are used with non-data storing contactless cards, they will run in "30 day free evaluation mode" until your Standalone license key has been entered. When your computer is online and you open the ConCERTO LOGON program, you will be automatically prompted to enter your license key.

Note that if you are using a non-data storing contactless card, your ConCERTO LOGON data will be stored on your local computer. Therefore, if you need to use your ConCERTO LOGON data on another computer you must create a backup of your data using the ConCERTO LOGON backup function (under Utilities). Then, copy the backup file to the new computer, and use the restore function (under Utilities) to associate the data with your card at that computer.

Likewise, if you lose your card and previously made a backup of your ConCERTO LOGON data you will be able to restore your data to a new card, as long as you know the backup password that you previously specified. See also the Utilities section of this manual for further information.

### 2.3.3 Installations with fingerprint readers

When ConCERTO LOGON is used with a fingerprint reader, the fingerprint authentication replaces, or is used in

addition to, PIN entry.

Upon first use, you will be prompted to enroll your fingerprint. If the installation requires, you may also be prompted to select a PIN, which will be required in addition to the fingerprint, or may alternatively be used instead of the fingerprint, if allowed by the installation.

To register your fingerprint, follow the instructions provided on-screen. Typically, you will be prompted to place a finger parallel on the fingerprint reader and place the pad of the finger flat in the center of the fingerprint reader membrane, or slide your finger down the reader. You will typically be prompted to register two or three fingerprints, which you may choose. For simplicity, ConCERTO LOGON recommends registering the index and middle fingers on your "non-primary" hand; ie, if you're right-handed, register the index and middle fingers on your left hand. However, if for some reason one of these fingers does not register well, you may want to choose another finger that registers well.

You will be prompted to place or slide each finger pad repeatedly on the fingerprint reader, to ensure a good registration. If one of your fingers fails to register well, choose another finger. After your fingers have been successfully registered, you can use either finger for ConCERTO LOGON authentication (unless your installation requires that you use both).

If you find it difficult to get a good print when you place your finger on the reader, try moisturizing your fingerpads with moisturizing lotion. This can make a big difference, and can make fingerprint enrollment and authentication much faster.

In rare cases, some people's fingers do not make good prints. If you are not able to register successfully yourself, refer to your ConCERTO LOGON administrator, who will try to assist you in getting a good image.

## 2.4 Changing Default Card PIN

ConCERTO LOGON will prompt you to enter your card PIN:

1. Type in your ConCERTO LOGON card PIN, and click on the OK button. Type in the initial default PIN (Personal Identification Number), "12345", if you have not been assigned a PIN.
2. When you logon to the ConCERTO LOGON program the first time, the program will ask if you want to change the PIN. Click on the Yes button, to change the default card PIN. The Change PIN window will appear.

To change default card PIN:

3. Type in the current PIN ("12345" or the default PIN assigned by your administrator).
4. Choose a new PIN, and enter it twice, as shown.

**Note:** If you choose to write your card PIN down, you must store this information in a secure place, so that the security of your ConCERTO LOGON data is not compromised.

**Important note for cardholders who do not have a system administrator:** If you have a ConCERTO LOGON Standalone version, you have sole responsibility for your ConCERTO LOGON PIN and you must be very careful not to lose your ConCERTO LOGON PIN. Because of the sensitive nature of the information which is stored with the card on the ConCERTO LOGON program, it would be a breach of security for the manufacturer to reset your card PIN so that you could choose a new PIN.

5. Click on the OK button.

If your installation uses a Personal Unlock Key (PUK):

- You will be prompted to change your default card PUK as well, in the same manner as described above. The program default for the PUK is also "12345", unless your administrator assigns you a different default PUK.
- The PUK is used to "unlock" your card if you forget your card PIN. Since the PUK is the only way to unlock your card and you are the only person who knows your card PUK, be sure to store the PUK in a secure place where it will be available when required.

## 2.5 Screen Basics

Upon successful card PIN entry, the main ConCERTO LOGON Manager screen – the Logon entries screen – will be displayed.

### 2.5.1 Using the Menu Bar

To quickly familiarize yourself with the ConCERTO LOGON program, note that the menu bar at the top of the ConCERTO LOGON screen provides access to all ConCERTO LOGON functionality. Click on the menu bar subjects – File, Settings, Utilities, and Help – to get an overview of the program.

The short-cut buttons below the menu bar provide quick access to ConCERTO LOGON functions which are used most frequently:

- Save: save newly entered data.
- Lock: lock workstation with secure screen-saver.
- Create: create random passwords.
- Record: record logon or form entries.

### 2.5.2 Data Categories

Available data categories for organizing your entries are displayed below the short-cut buttons. Standard ConCERTO LOGON installations have three categories: Logon, Address, and Payment. Click on a category name to change category.

### 2.5.3 Changing ConCERTO LOGON Screen Placement

Click on the blue bar at the top of the ConCERTO LOGON screen, to move the ConCERTO LOGON screen or a ConCERTO LOGON window. The ConCERTO LOGON screen will always be the topmost window, when it is active.

## 2.6 Card Enabled Windows / Network Logon

If you will be using your card to logon to Windows 2000, 2003, XP, 7 or Vista, the first thing you should do is enter your Windows / network user name, password and domain into the ConCERTO LOGON program. Once this is accomplished, ConCERTO LOGON will transfer this information to your Windows/network logon process the next time you reboot your computer and logon.

Note: If your installation has enabled the Logon Entries Wizard, you will be automatically prompted to enter your Windows logon information the first time that you start the ConCERTO LOGON Manager program.

Using your card to logon to Windows / networks has the following advantages:

- You no longer have to enter your Windows / network logon user name, password and domain manually.
- Because you do not enter the logon information manually, no one can look over your shoulder or record your entry strokes.
- You can use ConCERTO LOGON to generate random password strings, making it easy for you to use longer passwords and to change your password frequently.

Note that if you setup card enabled Windows / network logon, you will be prompted to insert your contact card into the contact card reader (or pass contactless card over reader) and enter your card PIN if you use the Windows secure screen saver feature, or the Windows lock / unlock workstation feature.

When ConCERTO LOGON is used with a fingerprint reader containing a SIM sized contact chip card, the fingerprint authentication replaces, or is used in addition to, PIN entry.

#### Note for Windows Vista administrators:

If you are using Windows Vista, you must be logged on as an administrator in order to change the Windows logon setting, and you must either start ConCERTO LOGON in elevated mode (right click on program to "Run as Administrator") or ensure that User Account Control (UAC) under Control Panel > User Account is unchecked.

Cardholders who do not have "Administrator" rights to their computer: if you save your Windows logon information in ConCERTO LOGON but you are not offered card enabled logon to Windows the next time that you reboot, please refer to your Administrator for assistance.

For more information on Windows logon related options, see "Logon to Windows" in the Settings Menu section.

### **2.6.1 Setting up Card Enabled Windows / Network Logon**

Follow the instructions provided below, to setup card enabled logon to Windows / networks.

1. Click on "Settings" in the menu bar, and click on the "Logon to Windows" selection.

The Logon to Windows Settings window will appear.

2. Click on the check box to the left of "Use card to logon to Windows XP, Vista, 2000, 2003" A check will appear in the box, to show that this setting is activated.
3. Click on the New button, to add a new entry. The Enter Logon to Windows Information window will appear.
4. Enter an entry name which you will recognize this entry by, for example "Accounting" or "Development". This entry will appear in the Select Logon to Windows Entry window the next time you logon.

Enter the user name, password, and domain name that you use to log on to the specified location. Enter the password twice, to ensure correct entry. (The "Current Password" field will not be available for entry upon first use.)

Click on the box to the left of "Prompt to change password every specified number of days" if you want to be prompted to change your password for this entry. Click on the selection box to the right of the option to specify the number of days between prompts. If this has been preset by your system administrator, you will not be able to change this setting.

The Storage location tab shows if the entry is stored on the card or locally on your computer, or on the server. If your card is a data carrying card and your installation uses a server, you can choose to specify which entries will be stored on the card and which will be stored on the server. If this has been preset by your system administrator, you will not be able to change this setting.

If "Entry is mirrored on server" is checked, this indicates that your installation mirrors all logon data on the server, so that if cards are lost the logon data can be efficiently recovered. If "Entry managed by administrator" is checked,

this indicates that the entry is managed by an administrator. In this case, the degree to which you can change the entry will be dictated by the administrator.

The Permissions tab shows what permissions the cardholder has to view, edit, or delete the entry. Permissions are preset for each installation and cannot be changed by the cardholder.

Click on the OK button, when you have completed entry for this window.

You will be returned to the Logon to Windows Settings window.

5. Under Card Control, click on the selection box if you want to lock, logoff or shutdown your workstation when you pull your card from the card reader. (For PC/SC compatible card readers only.)

Click on the countdown selection box to specify the number of seconds before the action will be taken after the card is pulled, if your installation allows you to change this setting.

6. Click on the OK button to continue.

The New Setting window will be displayed, informing you that the "New setting will be activated after next system reboot". Click on the OK button.

7. "Do you want to save data now?" will appear. Click on the Yes button, to save.

## 2.6.2 Logging onto Windows / Network with Card

If you set up your ConCERTO LOGON program to logon to Windows / network using the instructions provided in the previous section, the next time that you reboot your computer and logon to Windows, ConCERTO LOGON will accomplish the logon transparently. You will only have to enter your card PIN, for card authentication.

To logon to Windows with your card:

1. Power up your computer. A ConCERTO LOGON window will prompt "Logon to Windows with ConCERTO LOGON Manager?". Click on OK button.

You will then be prompted to pass your contactless card over reader and type in your card PIN. Click on OK button to continue.

The Logon to Windows window will appear.

2. If you have more than one Windows Entry (different Windows logon locations), click on the "down arrow", to select an entry. Click on the OK button, when entry for this window is complete. Logon to Windows will be accomplished.

## 2.7 Saving ConCERTO LOGON Data

When you enter new data into ConCERTO LOGON, or when you change ConCERTO LOGON data, the new information will be stored in memory in encrypted form on your computer until you save it.

- If you are using a data-storing card, when you click on the Save button, data will be saved to your card.
- If you are using a card that does not store data, when you click on the Save button, data will be saved on your local computer (Standalone version) or transferred via SSL to a secure server (Enterprise version).

**Important! Data which is not saved to the card (or to the local computer/secure server) will not be available in the ConCERTO LOGON program the next time you logon.**

To save ConCERTO LOGON data:

- Click on the Save short-cut button at the top of the ConCERTO LOGON screen, or
- Click on "File" in the menu bar, and click on the "Save Data" selection or "Save to Server" selection.

Alternately, each time you exit the ConCERTO LOGON program, you will be asked if you want to save updated information.

The Save short-cut button at the top of the ConCERTO LOGON screen can be clicked at any time, to save ConCERTO LOGON data.

When you have added or changed information, the Save button will appear in full color, indicating that there is information which should be saved. Click on the button, to save the updated data.

If no new data has been entered, the Save short-cut button will be colored light gray, and clicking on the button will have no effect.

It's a good idea to save new data occasionally while you are working in the ConCERTO LOGON program, for example, in case of a PC failure.

Note: Use the selection "Save to Laptop" under the "File" option if you will be traveling with a computer and you will not have access to an uninterrupted Internet connection (not dial-up) during your trip. See description of "Save to Laptop" in the File Menu section.

## 2.8 Minimizing / Accessing ConCERTO LOGON in System Tray

Instead of exiting the ConCERTO LOGON program after you use it, you can store it in your system tray in the bottom right corner of your screen, so that it is readily available to assist with the next logon.

### 2.8.1 Minimizing to System Tray

To minimize the ConCERTO LOGON program to the system tray:

- Click on the standard Microsoft (X) button in the top right corner of the ConCERTO LOGON screen, or
- Click on "File" in the menu bar, and click on the "Minimize to System Tray" selection.

When you minimize ConCERTO LOGON to the system tray, the ConCERTO LOGON program will no longer appear on your screen. When ConCERTO LOGON is held in your system tray, you will see the ConCERTO LOGON icon in the bottom right corner of your screen.

Note: If you added or changed any ConCERTO LOGON data, it is recommended that you save your data before you minimize the program. This will ensure that your new data is not lost in case your system fails while ConCERTO LOGON is held in the system tray.

### 2.8.2 Accessing from System Tray

When the ConCERTO LOGON program is stored in your system tray, you will see the ConCERTO LOGON icon (ConCERTO LOGON head) in the bottom right corner of your screen.

You can open ConCERTO LOGON from the system tray in two ways:

- Double-click on the ConCERTO LOGON icon in the system tray.
- Click on the ConCERTO LOGON icon in the system tray with the right mouse button, and click on a selection to short-cut directly to a program screen.

Depending on the settings of your ConCERTO LOGON installation, you may also be required to enter your card PIN each time you access the ConCERTO LOGON program from your system tray. See description of "General Settings" in the Settings Menu section, for more information on the PIN verification timeout setting.

## 2.9 Exiting the Program

To exit the ConCERTO LOGON program:

- Click on "File" in the menu bar, and click on the "Exit" selection.

If you added or changed ConCERTO LOGON data, you will be asked if you want to save changes. If you want to save changes, click on the Yes button.

## 3 Logon Entries Screen

ConCERTO LOGON securely stores logon information for websites and applications, so that you no longer need to remember user names and passwords.

Note: If your installation has enabled the Logon Entries Wizard, you will be automatically prompted to enter your logon information for applicable websites or applications the first time that you start the ConCERTO LOGON Manager program.

Note also that ConCERTO LOGON records and facilitates entry of form information, i.e., entries which do not include a user name and password. Form recording and entry can also be accomplished using the logon entry instructions provided below.

In the case of data-storing cards, the amount of storage space that you have for logon entries will be dependent on the size of your card chip and whether or not the card chip is also used for other applications. You can maximize your storage space in any case by not storing unneeded information, and by minimizing the number of long website URL designations (i.e., web addresses with long, complicated endings) that you store.

The Logon entries screen is displayed when you enter the ConCERTO LOGON program. To get back to the Logon entries screen from anywhere else in the program, click on the Logon selection.

The Logon entries screen provides access to the following:

- **To enter new logon information for a website or application** - Use the Auto-Recorder feature or the Record button option; or click on the New button on the right side of the screen to enter information manually.
- **To change logon information** - Click on a website or application entry to select it from the list on the screen. Click on the Change button on the right side of the screen.
- **To delete logon information** - Click on a website or application entry to select it from the list on the screen. Click on the Delete button on the right side of the screen.
- **To use ConCERTO LOGON to logon to a website or application** - Go to a website or application which ConCERTO LOGON knows, or double-click on a website or application entry in the list on the screen to go to the location. Logon will be accomplished automatically, or with user intervention, depending on the selected options for that entry.

Note also that when you right-click on an entry, the logon information will be displayed and can be transferred directly to a logon location with the button click feature, or can be "dragged and dropped" to a logon field.

Logon entries screen functions are described below, to assist you with entering your own logon information and logging on to a website / application with ConCERTO LOGON.

### 3.1 Enter Logon Information

Logon entry information can be entered into the ConCERTO LOGON program in three ways:

- **Auto-Recorder** - The Auto-record Complete window is displayed whenever cardholder enters logon information into a website or application logon location which ConCERTO LOGON recognizes as being recordable. Cardholder enters logon information as usual and clicks OK button to record the logon entry, or Cancel. Upon delivery, Auto-Recorder is typically set to active (in "Settings" menu under "General").
- **Record option** - User clicks on Record short-cut button or selects "Record" from "Utilities" menu to record a logon entry. This option is useful for recording logon or form entries which the Auto-Recorder does not recognize, such as certain Windows applications, or when the Auto-Recorder feature is not set to "active".
- **Manual entry** - User clicks on New button, to enter logon information into ConCERTO LOGON program

manually.

Each of the entry methods are discussed below.

### 3.1.1 Enter Logon Information with Auto-Recorder

To enter logon information into the program with the Auto-Recorder:

1. First, ascertain that the Auto-Recorder is set to "active". If you are not sure, click on "Settings" in the menu bar, and then click on "General". Make sure that a check appears in the "Enable Auto-Recorder" check-box.
2. Next, go to the logon location of a website or application where you already have a user name and password.
3. Enter your logon information into entry fields and complete logon as usual.

If the Auto-Recorder recognizes the logon location as being recordable, the Auto-Recorder window will be displayed.

Typically, the Auto-Recorder will recognize most website and standard Windows logon locations. Other types of applications may not be recognized, in which case you should initiate recording using the Record option described in the next section.

The Auto-Recorder will not be displayed for locations which have already been recorded by ConCERTO LOGON. However, if logon information for an entry was entered into ConCERTO LOGON manually (not recorded), the Auto-Recorder will be displayed because the Auto-Recorder will still recognize the logon location as being recordable.

For Windows applications: You must type in logon information using tab and Enter keys, as instructed by the Record Windows Application Logon window. Mouse clicks are not recognized.

Windows Vista administrators: You must turn off the Windows User Account Control (UAC) feature, which by default is set to "on", before you will be able to record Windows application logons. You can change this setting at: Start > Control Panel > User Accounts > Turn User Account Control on or off. Note that you must have administrator rights to turn User Account Control off.

If you want to turn User Account Control back on after recording an application, be aware that end-users who do not have administrator rights will not be able to record applications. Many administrators record applications for end-users and load the entries directly to the user cards, so this is not a problem in that case. However, administrators who want users to be able to record application logons may want to leave the User Account Control turned off.

Note also that the ConCERTO LOGON program must be active - visible on the screen or minimized in the system tray - in order for the Auto-Recorder to be displayed.

4. Click on the Yes or OK button, if you want to save the logon information for the location. The Auto-Recorder will record the entry information and the Logon Information window will be displayed.

For Windows applications: A window will be displayed, informing you that the application path for this entry has not been recorded. You will have an opportunity to record the application path in the Logon Information window. ConCERTO LOGON does not automatically record the application path since users often have multiple application windows open at one time, and ConCERTO LOGON cannot always differentiate which one the user desires to record. By designating the path themselves, users can be sure that the desired window is specified.

A name will be suggested for the entry. Change the name as desired. This entry name will be listed in the selection box on the left side of the Logon entries screen.

For Windows applications: Click on the Get path button, to specify the application path for this entry.

Note: You may occasionally notice that the Auto-Recorder captures and records information which you don't see on the website / application fields. This can occur, for example, when a website has radio/selection buttons, or entry fields which are hidden from the end-user. Sometimes you can still use this recording, for example, by clicking the "Enter with Fill" option off for that particular field. If however, you find that you cannot get a recording of a website or application which works well for you, you would be advised to enter your logon information for this location manually.

Refer to reference chart on the following pages for assistance with entry.

5. Click on OK button to save.

### 3.1.2 Enter Logon Information with Record Option

To enter logon information into the program with the Record option:

1. Open the ConCERTO LOGON program, so that it is visible on the screen (not minimized in system tray).
2. Go to the logon location of a website or application where you already have a user name and password.
3. Click on the Record short-cut button or select "Record" from the "Utilities" menu. The Record window will be displayed.
4. Enter logon information into entry fields and complete logon as usual.

For Windows applications: You must type in logon information using tab and Enter keys, as instructed by the Record Windows Application Logon window. Mouse clicks are not recognized.

5. Click on the OK button, to save the logon information for the location.
6. For Windows applications: A window will be displayed, informing you that the application path for this entry has not been recorded. You will have an opportunity to record the application path in the Logon Information window. ConCERTO LOGON does not automatically record the application path since users often have multiple application windows open at one time, and ConCERTO LOGON cannot always differentiate which one the user desires to record. By designating the path themselves, users can be sure that the desired window is specified.

Click on OK to continue.

7. The Logon Information window will be displayed.

A name will be suggested for the entry. Change the name as desired. This entry name will be listed in the selection box on the left side of the Logon entries screen.

For Windows applications: Click on the Get path button, to specify the application path for this entry.

Note: You may occasionally notice that the Recorder captures and records information which you don't see on the

website / application fields. This can occur, for example, when a website has radio/selection buttons. If you find that you cannot get a recording of a website or application which works well for you, you would be advised to enter your logon information for this location manually.

Refer to reference chart on the following pages for assistance with entry.

Click on OK button to save.

### 3.1.3 Enter Logon Information Manually

To enter new logon information into the program manually:

1. Begin by clicking on the New button on the right side of the Logon entries screen.

The Logon Information window will appear. Enter logon information for a website or application where you already have a user name and password. Use the reference chart on the following pages for assistance with entry.

2. Click on the OK button, when entry is complete.
3. When entry has been completed, your new entry will appear in the selection box on the left side of the Logon entries screen.

This reference chart describes the entry fields in the Logon Information window.

Note: Depending on your installation, some of the entry fields described below may be preset, or not available.

#### Entry name and location

|                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name of website / application:</b>        | <p>Enter a name for the website / application which you will easily recognize, such as "Yahoo Email" or "AT&amp;T Teleconferencing".</p> <p>The name which you enter here will be displayed in the selection list on the Logon entries screen.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Web address (URL) / application path:</b> | <p>Enter the web address or application path of the website / application. You can specify any address or path which is most convenient for you; generally, the logon location is specified here.</p> <p>Once this information has been entered, you can use ConCERTO LOGON to short-cut directly to the specified location by double-clicking on the entry in the Logon entries screen selection list.</p> <p>The easiest way to enter a web address is with the Get URL button. When you click on the Get URL button, you will be instructed to call up the website location that you would like ConCERTO LOGON to navigate to. When you then click on the Get location button, the location will be captured.</p> <p>The easiest way to enter an application path is with the Get path button. When you click on the Get path button, you can select the path from a standard file list. When you then click on the Open button, the location will be captured.</p> <p>You can also go to the website / application location, and copy/paste the address / path directly into the ConCERTO LOGON field.</p> <ul style="list-style-type: none"><li>▪ For websites, enter the complete address, including "http://", so that it is possible for</li></ul> |

|  |                                                                                                                                                                                                                                      |
|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>ConCERTO LOGON to navigate directly to this location.</p> <ul style="list-style-type: none"> <li>For applications, remember to include both the path, for example "C:\PROGRAMS\" and the application or document name.</li> </ul> |
|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Entry fields

|                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Entry field type:</b></p> <p>" ... " <b>button:</b><br/>(Create random password / Display Password Policy)</p> | <p>Since websites and applications typically authenticate users with a User Name and Password, User Name and Password are shown as default entry field types.</p> <p>To change these defaults, click on the "down arrow", to select any other combination of entry fields. Account, 2<sup>nd</sup> User Name and 2<sup>nd</sup> Password are additional options. Or, put your cursor over the default entry field type, and enter a new field type.</p> <p>Note that if you want ConCERTO LOGON to be able to transfer your logon information into a website / application, you must ensure that the entry fields which are displayed in ConCERTO LOGON appear in exactly the same order as the entry fields in your website / application.</p> <p>Click on the "..." button, if you want ConCERTO LOGON to generate a unique random password for this entry field or to view the Password Policy, if applicable.</p> <p>The Generate option is helpful, for example, if you are required to change your password frequently. This button can likewise be used to generate a random user name, if desired.</p> <p>In the Create Password window, you can specify the number of characters you would like, as well as the type of character. (In some installations, this selection may be governed by a Password Policy.) When you click on the Generate button, a new password will be generated.</p> <p>Click on the "Private" check-box to toggle the check mark, if you want to view the password in the clear.</p> <p>Click on the OK button, to accept a new password. The new password will be displayed in the Entry data field.</p> <p>Once you have generated a new user name / password, you must then refer to the requirements of the individual website / application to enter the new information into the website / application. For example, if you are changing your password, you must enter this new password into the "change password" area of the website / application manually, the first time you use it. Note that you can copy/paste the new password from the ConCERTO LOGON password field to your website / application, even if the password is shown as "*" (asterisks).</p> <p>The Create short-cut button is available from the main screen to assist with creating strong random passwords, for example, when you are logging on to a new website for the first time and need to create a strong random password. Then, you can "drag and drop" the new password into the new logon location. When this screen is accessed from the Create short-cut button, you can also choose to temporarily "keep" a password that you created, so that if you choose to subsequently logon to the new website so that ConCERTO LOGON can auto-record the new logon entry, the new password is still handy. A new generated password that you "keep" will be stored in the random password buffer, which stores only one password at a time. Clicking on the Cancel button gives you the option to clear the buffer.</p> |
| <p><b>Entry data:</b></p>                                                                                            | <p>Type in the entry data which you use to logon to this website / application. For example, if the entry field type is user name, enter your user name; if the field type is password, enter your password. Type in the information exactly as you enter it when you logon to the website / application.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

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|--------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Keystrokes for user-initiated fill:</b> | <p>(Only for manually entered logon information.)</p> <p>User name default setting: ConCERTO LOGON suggests a default setting of a single tab keystroke after entry of a user name, because most logons require that the tab key be pressed once after the user name has been typed into the entry field, to bring the cursor to the password field.</p> <p>Password default setting: ConCERTO LOGON suggests a default setting of a single Enter key stroke after entry of a password, because most logons require that the Enter key be pressed once after the password has been typed into the entry field, to execute the logon.</p> <p>If your logon location requires a different tab/enter key setup: Click on the "down arrow" to select a different keystroke entry combination. Remember that the ConCERTO LOGON window displays the entry data exactly as it will be entered into your website / application. Therefore, you need to ensure that the keystrokes are also shown in the correct order.</p> <p>Check the number of keystrokes which are required by the website / application by entering the information manually at the website / application. Note how many keystrokes are required after information has been typed into a data field, and change the setup in ConCERTO LOGON accordingly.</p> <p>You can choose an entry which is listed in the selection box, or you can customize this function by entering a different keystroke. Click on the Help button, to see the keystrokes which are known to the ConCERTO LOGON program. Enclose your customized entry in brackets, as shown in the default settings.</p> |
| <b>Repeat</b>                              | (Only for manually entered logon information.)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>keystrokes:</b>                         | <p>You can specify that keystrokes be repeated, by selecting an entry with an "x". The "x" indicates that the keystroke will be repeated the number of times which you specify in the "Repeat keystrokes" column.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Enter</b>                               | Click on the "Enter with fill" check-box for an entry field if you want the ConCERTO LOGON program to automatically enter the entry data into your website / application. When "Enter with fill" is activated, a check will appear in the check-box.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>with</b>                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>fill:</b>                               | ConCERTO LOGON suggests a default setting of "Enter with fill" for both user name and password, since the majority of websites / applications require that both a user name and password be entered.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Private:</b>                            | Click on the "Private" check-box for an entry field, if you want the entry data to be displayed on your screen in asterisks (***) rather than in readable form.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|                                            | When you click on the "Private" check-box, you may be required to enter your PIN, depending on the requirements of your particular installation or your "PIN verification timeout setting" (see "PIN verification timeout setting" under "General Settings" in the Settings Menu section, for more information).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|                                            | Note also that entry field types which are specified as "Password" will always revert to a "Private" setting, as a standard security measure.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

## Options: Fill method

|                     |                                                                                                                                                                                                                            |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Fill method:</b> | Click on the down arrow to the right of the selection box to select your preferred fill method for this entry.                                                                                                             |
|                     |                                                                                                                                                                                                                            |
|                     |                                                                                                                                                                                                                            |
|                     |                                                                                                                                                                                                                            |
|                     | <u>Auto-Fill and submit</u> (This option will only be available if the entry was recorded with either the Auto-Recorder or Record option, and if the Auto-Fill feature is enabled in the "Settings" menu under "General".) |

|                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                       | <p>When this option is selected, when you go to a logon location which was recorded by the ConCERTO LOGON program ConCERTO LOGON will recognize the location and automatically fill in and submit the logon information.</p> <ul style="list-style-type: none"> <li>▪ Auto-Fill will function both when you go to the logon location directly, or when you double-click on the entry in the ConCERTO LOGON program to go to the location.</li> <li>▪ ConCERTO LOGON program must be active - visible on the screen or minimized in the system tray - in order for the Auto-Fill to work.</li> </ul> <p>Note also that user should be very careful when choosing to include the submit action as a part of the logon process. When information is automatically submitted, user has no opportunity to review the entry to ensure that the information has been entered into the correct location, for example, when websites change, etc.</p> <p><u>Auto-Fill and don't submit</u> - As Auto-Fill description above, except that logon information will be filled in but not submitted. You submit the logon information by clicking on the location's enter/submit button. This provides you with more control over the logon process.</p> <p><u>Button click fill and submit</u> - When this option is selected, when you double-click on the entry in the selection list on the Logon entries screen to go to the logon location, the Logon window will open in the "button click" version. To enter logon information, click on the Fill Form button in the web browser toolbar (for ConCERTO LOGON recorded entries) or Logon Now button (for manually entered entries), as directed. Information will be submitted as part of the logon process.</p> <p>Note: When logon information is entered manually, this option will read "Button click fill", without the submit option. This is because with manually entered entries, users can specify the required number of tab and enter keystrokes, and a submit option is unnecessary.</p> <p><u>Button click fill and don't submit</u> - As Button click description above, except that logon information will be filled in but not submitted. You submit the logon information by clicking on the location's enter/submit button. This provides you with more control over the logon process.</p> |
| <b>Pop-up active:</b> | <p>(Only offered when Auto-Fill feature is not enabled for this entry, and if the pop-up feature is enabled in the "Settings" menu under "General".)</p> <p>This choice should be selected if you want ConCERTO LOGON to automatically pop up whenever you go to the specified web address / application path. Once you have setup the location, whenever you browse to the specified location the ConCERTO LOGON window will pop up with your logon information for the website or application, and you will only need to click on the Fill Form button in the web browser toolbar (for ConCERTO LOGON recorded entries), or the Logon Now button (for manually entered entries).</p> <p>For entries which were not recorded, an additional Pop-up location button will be displayed. Entries which were not recorded sometimes need additional information in order for them to pop up. Click on the Pop-up location button to ascertain that a Pop-up location is stored, or follow the instructions provided in the window to capture the location.</p> <p>Note that the ConCERTO LOGON program must be currently active in order to use this feature, ie: minimized to the system tray (see also Minimizing to System Tray section). If the ConCERTO LOGON program is not active, the pop-up feature will not work.</p> <p>See also "Pop-up Option Notes" later in this section, for more information.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

## Options: Password change

|                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Change password every specified number of days:</b>            | This box should be selected if you want ConCERTO LOGON to prompt you when it's time to change your password for this entry. Enter the number of days you want in between password changes by clicking on the selection box to the right of the option.                                                                                                                                                                                                                                                                                                      |
| <b>Verify that password was changed in website / application:</b> | <p>This box should be selected if you want ConCERTO LOGON to prompt you to verify that password changes you make in the ConCERTO LOGON program have already been made at the logon location.</p> <p>This monitoring will only apply to entry field types which are specified as "Password". If this box is selected, when you change a password, verification prompt will ask "Did you already change this password in the website/application?" If you click on Yes, the new password will be saved. If you click on No, the change will not be saved.</p> |

## Options: Autostart

|                                                                         |                                                                                                                                                    |
|-------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Never:</b>                                                           | This option should be selected if you never want this website / application to automatically start.                                                |
| <b>With each start of ConCERTO LOGON Manager:</b>                       | This option should be selected if you want this website / application to automatically start each time a ConCERTO LOGON Manager session is opened. |
| <b>Only when ConCERTO LOGON Manager autostarts after Windows logon:</b> | This option should be selected if you only want this website / application to automatically start after Windows logon.                             |

## Options: Storage location

|                                           |                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Entry is stored at:</b>                | For installations which have this capability enabled: If your installation uses a data-carrying card and also uses a secure server, you can choose to store some logon entries on the card - which affords optimal portability, and some entries on the server - which provides additional storage space when you have access to the server. |
| <b>Entry is mirrored on server:</b>       | If this box is checked, this indicates that your installation mirrors all ConCERTO LOGON logon data on the server, so that if cards are lost the logon data can be efficiently recovered.                                                                                                                                                    |
| <b>Entry is managed by administrator:</b> | If this box is checked, this indicates that the entry is managed by an administrator. In this case, the degree to which you can change the entry will be dictated by the administrator.                                                                                                                                                      |

## 3.2 Logon to a Website or Application

ConCERTO LOGON-assisted logon to a website or application can be accomplished in the three ways listed below. Cardholder specifies which fill method will be used for each entry in the Logon Information window.

- **Auto-Fill**  
When Auto-Fill is set to "active" for an entry which was recorded by ConCERTO LOGON, when user goes to that logon location, logon information will be automatically filled in.
- **User-initiated fill with button click**  
User double-clicks on an entry in the selection list on the Logon entries screen to go to the logon location and enters logon information by clicking on the Fill Form button in the web browser toolbar (for ConCERTO LOGON recorded entries) or Logon Now button (for manually entered entries), as directed.

Note also that when you right-click on an entry, the logon information will be displayed and can be transferred directly to a logon location with the button click feature, or can be "dragged and dropped" to a logon field.

For more information on each fill method, refer to the Enter Logon Information section.

If you specified multiple logon entries for a single location: be aware that the ConCERTO LOGON program can only call up the correct entry in this case when you click on the entry from ConCERTO LOGON. Otherwise, for Auto-Fill and pop-up scenarios, the ConCERTO LOGON program has no way of knowing which entry you intended to use.

If cardholder does not change the settings, default settings are as follows:

For entries which were recorded by ConCERTO LOGON, fill method default is Auto-Fill.

For entries which were entered manually, fill method default is button click fill.

Logging on with each of the fill methods is described below.

### 3.2.1 Logon with Auto-Fill

1. First, ascertain that the logon location where you want to logon with Auto-Fill has been recorded by the ConCERTO LOGON program ("Recorded Entry" will be displayed in Logon Information window title) and that the Auto-Fill method has been selected as the preferred fill method for this entry in the Logon Information window.
2. Next, go to the logon location.

Go to the logon location directly, or

If you specified the web address / application path (in the Logon Information window; see previous section) of the logon location for the website / application you want to logon to, you can use ConCERTO LOGON to go to this location by double-clicking on the entry in the selection list in the Logon entries screen.

3. The Logon window will be displayed and your logon information will be automatically filled into the target logon location. Whether the logon information is automatically submitted as part of the Auto-Fill process will depend on whether you selected "Auto-Fill and submit" or "Auto-fill and don't submit" (see Enter Logon Information section).

Note: When logon information for a location was recorded by ConCERTO LOGON, the program will only fill logon information into the exact location which ConCERTO LOGON recorded from. For websites where this location is constantly changing, it is recommended that you manually enter this information into ConCERTO LOGON.

If your computer is busy processing something else, it is possible that the Auto-Fill might, on rare occasions, time-out before it completes.

### 3.2.2 Logon with User-initiated Fill with Button Click

1. First, ascertain that button click has been selected as the preferred fill method for this entry, in the Logon Information window.
2. Next, double-click on the entry in the selection list in the Logon entries screen. The Logon window for this entry will be displayed.

If you specified the web address / application path (in the Logon Information window; see previous section) of the logon location for the website / application you want to logon to, ConCERTO LOGON will go to this location.

If ConCERTO LOGON doesn't navigate to the location and the URL has been correctly entered, check to make sure that the default browser setting of your Windows installation is set to either Internet Explorer or Netscape: In the Windows desktop click on "Start" then "Run" and enter any valid website address, for example, "www.opendomain.com" and click on OK. If the system does not navigate to the website successfully, first make sure that your browser has been properly installed, and then make sure that it has been set as the default browser. For example, to set Internet Explorer to be your default browser: Open Internet Explorer. Click on the "Tools" menu and click on "Internet Options". Click on the "Programs" tab. Make sure that the box next to "Internet Explorer should check to see whether it is the default Web browser" is checked.

If you did not specify the logon location in ConCERTO LOGON, go to the logon location directly.

Or, if you activated the pop-up feature for this entry in the Logon Information window, go to the logon location which you specified for pop-up and the Logon window for the entry will pop up.

3. For logon entries which were recorded by ConCERTO LOGON: Click on the Fill Form button in the web browser toolbar to enter logon information into entry fields, as directed. Whether the logon information is automatically submitted will depend whether you selected "Button click fill and submit" or "Button click fill and don't submit" (see Enter Logon Information section).

Note: When logon information for a location was recorded by ConCERTO LOGON, the program will only fill logon information into the exact location which ConCERTO LOGON recorded from. For websites where this location is constantly changing, it is recommended that you manually enter this information into ConCERTO LOGON.

For logon entries which were manually entered: In the website / application logon screen: Look at the first target logon entry field - usually the User Name field - to confirm that your cursor is positioned in this field. Most websites / applications automatically direct the cursor to the first target logon field automatically.

If however, your cursor is not in the target field, click once on the target logon field, so that ConCERTO LOGON will know where to begin data entry.

In the Logon window: The logon information for the website / application which you selected will be displayed.

Click on the Logon Now button. Your User Name and Password will be transferred to the website / application's logon screen.

4. After you have been logged on, the ConCERTO LOGON program will minimize to your system tray in the bottom right corner of your screen. Double-click on the ConCERTO LOGON icon (ConCERTO LOGON head) in the system tray, to open the program again.

### 3.2.3 Pop-up Option Notes

Usage of the pop-up option is described in the previous section in combination with the user-initiated button click logon method.

Note also the following if you use the pop-up option:

- Remember that the ConCERTO LOGON program must be active, in order for it to pop-up to assist with logon. The ConCERTO LOGON icon (ConCERTO LOGON head) will appear in your system tray in the bottom right corner of your screen, when ConCERTO LOGON program is active.
- Once ConCERTO LOGON has popped up at a screen, and you have minimized ConCERTO LOGON, it will only pop up again at that screen after you go to a different screen and come back to that screen again. This is to ensure that ConCERTO LOGON does not repeatedly pop up at the same location, when it is not needed.

- In any case, ConCERTO LOGON will only pop up again after a 10 second pause – in other words, after it has been stored in the system tray for 10 seconds. This is also to ensure that it does not repeatedly pop up when it is not needed.
- If you have specified a Windows application location, the popup location will be defined by the window name. You may find that some applications use the same window name for numerous screens. In cases such as this, it is not helpful to use the pop-up capability.
- If your installation requires, you may be prompted to enter your card PIN before you may have access to the ConCERTO LOGON program. After entering your card PIN into ConCERTO LOGON, be sure to click back to the target logon field of the website / application – usually the “User Name” field – so that ConCERTO LOGON will know where to transfer the logon information.

### 3.3 Change Logon Information

To change logon information:

1. Begin by clicking on an entry in the selection list, then clicking on the Change button on the right side of the Logon entries screen.

The Logon Information window will appear. Change logon information for a website or application as required. Use the reference chart in the previous section, for assistance with entry. Note that for entries that were recorded by the ConCERTO LOGON program (Auto-Recorder or Record option), the keystroke entry fields cannot be changed.

2. Click on the OK button, when entry is complete.

### 3.4 Delete Logon Information

To delete logon information:

1. Begin by clicking on an entry in the selection list, then clicking on the Delete button on the right side of the Logon entries screen.
2. A window will appear: "Are you sure that you want to delete entry “xxx” ?" Click on the Yes button, to delete entry.

## 4 Address Entries Screen

ConCERTO LOGON securely stores address information. You can "drag and drop" this information into websites and applications, so that you do not have to continually re-type the same information.

Go to Address Entries Screen and click on the Address selection.

The Address entries screen provides access to the following:

- **To enter new address information:** Click on the New button on the right side of the screen.
- **To change address information:** Double-click on an entry in the list on the left side of the screen to display information, or  
Click on an entry to select it from the list on the left side of the screen and click on the Change button on the right side of the screen.
- **To delete address information:** Click on an entry to select it from the list on the left side of the screen. Click on the Delete button on the right side of the screen.
- **To "drag and drop" address information into a website or application:** Double-click on an entry in the list on the left side of the screen to display information. "Drag and drop" information into website or application.

Address entries screen functions are described below, to assist you with entering your own information and "dragging and dropping" information into a website / application.

### 4.1 Enter Address Information

To enter address information into the ConCERTO LOGON program:

1. Click on the New button on the right side of the Address entries screen, to enter a new address.

The Address: Drag and Drop window will appear.

2. Enter an Entry name for the address which you will easily recognize, such as "Headquarters" or "Home Office". The name which you enter here will be displayed in the selection list on the Address entries screen.
3. Enter the remaining address information as specified. A sample entry is shown above, to assist you.

Typical default labels for Address fields are displayed. To change field labels and privacy preferences, click on the More... button.

Note also that you can specify label settings as the default for the Address category by clicking on the check-box next to "Use specified labels as default for this category".

To set privacy preferences, click on the "Private" box. When a check appears in the "Private" box, the entry will be displayed in asterisks, so that the information cannot be easily viewed by a third party. Once an entry is displayed in asterisks, you will be required to enter your card PIN when you click on the "Private" box in order to view the entry in the clear again.

Change labels and privacy preferences as desired and click on OK button to return to the Address: Drag and Drop window.

4. Click on the OK button, when entry is complete. Your new entry will appear in the selection list on the left side of the Address entries screen.

## 4.2 Transfer Address Information into a Website / Application

To transfer address information into a website / application field:

1. Double-click on an entry in the selection list in the Address entries screen to display information. The Address: Drag and Drop window for the selected entry will be displayed.
2. Click on the arrow to the left of an item, and keeping mouse button pressed, drag it to the target website / application field. When you let go of your mouse at the target field, the information will be left there. Alternatively, you can copy/paste information to your target fields.

Click on the OK or Cancel button to close the window.

## 4.3 Change Address Information

To change address information in the ConCERTO LOGON program:

1. Double-click on an entry in the selection list on the left side of the screen to display information, or Click on an entry to select it from the list on the left side of the screen and click on the Change button on the right side of the screen.
2. The Address: Drag and Drop window will appear. Changes address information, as required.

Click on the More... button to change field labels or set privacy preferences with the "Private" option.

3. Click on the OK button, when entry is complete.

## 4.4 Delete Address Information

To delete address information from the ConCERTO LOGON program:

1. Click on an entry in the selection list in the Address entries screen, and click on the Delete button on the right side of the screen, to delete address information.
2. A window will appear: "Are you sure that you want to delete entry "xxx"?"
3. Click on the Yes button, to delete entry.

## 5 Payment Screen

ConCERTO LOGON securely stores payment information, such as credit card and bank information. You can "drag and drop" this information into websites and applications, so that you do not have to continually re-type the same information.

Go to the Payment entries screen and click on the Payment selection.

The Payment entries screen provides access to the following:

- **To enter new payment information:** Click on the New button on the right side of the screen.
- **To change payment information:** Double-click on an entry in the list on the left side of the screen to display information, or  
Click on an entry to select it from the list on the left side of the screen and click on the Change button on the right side of the screen.
- **To delete payment information:** Click on an entry to select it from the list on the left side of the screen. Click on the Delete button on the right side of the screen.
- **To "drag and drop" payment information into a website or application:** Double-click on an entry in the list on the left side of the screen to display information. "Drag and drop" information into website or application.

Payment entries screen functions are described below, to assist you with entering your own information and "dragging and dropping" information into a website / application.

### 5.1 Enter Payment Information

To enter payment information into the ConCERTO LOGON program:

1. Click on the New button on the right side of the Payment entries screen, to enter new payment information.

The Payment: Drag and Drop window will appear.

2. Enter an Entry name for the payment information which you will easily recognize, such as "Company Amex" or "Investment Account". The name which you enter here will be displayed in the selection list on the Payment entries screen.
3. Enter the remaining payment information as specified. A sample entry is shown above, to assist you.

Typical default labels for payment fields are displayed. To change field labels and privacy preferences, click on the More... button.

Note also that you can specify label settings as the default for the Payment category by clicking on the check-box next to "Use specified labels as default for this category".

To set privacy preferences, click on the "Private" box. When a check appears in the "Private" box, the entry will be displayed in asterisks, so that the information cannot be easily viewed by a third party. Once an entry is displayed in asterisks, you will be required to enter your ConCERTO LOGON card PIN when you click on the "Private" box in order to view the entry in the clear again.

Change labels and privacy preferences as desired and click on OK button to return to the Payment: Drag and Drop window.

4. Click on the OK button, when entry is complete. Your new entry will appear in the selection list on the left side of the Payment entries screen.

## 5.2 Transfer Payment Information into a Website / Application

To transfer payment information into a website / application field:

1. Double-click on an entry in the selection list in the Payment entries screen to display information. The Payment: Drag and Drop window for the selected entry will be displayed.
2. Click on the arrow to the left of an item, and keeping mouse button pressed; drag it to the target website / application field. When you let go of your mouse at the target field, the information will be left there. Alternatively, you can copy/paste information to your target fields.
3. Click on the OK or Cancel button to close the window.

## 5.3 Change Payment Information

To change payment information in the ConCERTO LOGON program:

1. Double-click on an entry in the selection list on the left side of the screen to display information, or Click on an entry to select it from the list on the left side of the screen and click on the Change button on the right side of the screen.
2. The Payment: Drag and Drop window will appear. Change payment information, as required.

Click on the More... button to change field labels or set privacy preferences with the "Private" option.

3. Click on the OK button, when entry is complete.

## 5.4 Delete Payment Information

To delete payment information from the ConCERTO LOGON program:

1. Click on an entry in the selection list in the Payment entries screen, and click on the Delete button on the right side of the screen, to delete payment information.
2. A window will appear: "Are you sure that you want to delete entry "xxx"?"
3. Click on the Yes button, to delete entry.

## 6 File Menu

"File", in the menu bar, provides the following selections:

- **Save Data** (or **Save to Server**): save updated ConCERTO LOGON information to data-storing card (or to secure ConCERTO LOGON server).
- **Save to Laptop**: (option is displayed only for contactless ID cards) save data to the computer that you travel with.
- **Minimize to System Tray**: minimize ConCERTO LOGON program to system tray.
- **Lock with Screen Saver**: lock workstation with secure screen-saver.
- **Exit**: exit ConCERTO LOGON program.

"File" selections are described below.

### 6.1 Save Data

When you enter new data into ConCERTO LOGON, or when you change ConCERTO LOGON data, the new information will be stored in memory in encrypted form on your computer until you save it.

- If you are using a data-storing card, when you click on the Save button, data will be saved to your card.
- If you are using a card that does not store data, when you click on the Save button, data will be saved on your local computer (Standalone version) or transferred via SSL to a secure server (Enterprise version).

**Important! Data which is not saved to the card (or to the local computer/secure server) will not be available in the ConCERTO LOGON program the next time you logon.**

To save ConCERTO LOGON data:

- Click on the Save short-cut button at the top of the ConCERTO LOGON screen, or
- Click on "File" in the menu bar, and click on the "Save Data" selection or "Save to Server" selection.

Alternately, each time you exit the ConCERTO LOGON program, you will be asked if you want to save updated information.

The Save short-cut button at the top of the ConCERTO LOGON screen can be clicked at any time, to save ConCERTO LOGON data.

When you have added or changed information, the Save short-cut button will appear in full color, indicating that there is information which should be saved. Click on the button, to save data.

If no new data has been entered, the Save short-cut button will be colored light gray, and clicking on the button will have no effect.

It's a good idea to save new data occasionally while you are working in the ConCERTO LOGON program, for example, in case of a PC failure.

## 6.2 Save to Laptop (for server mode installations)

If you are traveling with a laptop and you do not have access to an uninterrupted Internet connection (not dial-up) during your trip, you can save your ConCERTO LOGON data to your laptop (if enabled by your installation).

Laptop Mode makes it possible for you to access your ConCERTO LOGON data on the road by storing ConCERTO LOGON data locally on your laptop. However, storing data locally on a computer that can be easily transported constitutes a higher security risk than storing data on a card or secure server. Although your ConCERTO LOGON data is protected by encryption, if you choose to use this option you must protect your laptop from unauthorized access.

Laptop Mode can be used without a card and card reader, if your installation allows this. Some ConCERTO LOGON Administrators require that cardholders always carry their ID card and card reader with them, even when they are traveling. Try out Laptop Mode before you leave your headquarters, or ask your ConCERTO LOGON Administrator, to ensure whether or not a card reader is required on the road.

Likewise, some installations automatically save data that is saved to the server to the laptop as well. Ask your Administrator if this feature is enabled at your installation.

Note: When using Laptop Mode without a card reader, a "static" PC/SC compatible card reader driver must be installed in order for ConCERTO LOGON to function, even though a card reader does not need to be connected.

\* \* \*

To save ConCERTO LOGON data to laptop:

- Link your laptop to the company network. If you have not used your laptop with a card reader before, refer to the Installing ConCERTO LOGON section first, or consult your ConCERTO LOGON program administrator.
- Via your laptop, logon to ConCERTO LOGON using the "... Server Mode..." option, as usual.
- Click on "File" in the menu bar, and click on the "Save to Laptop" selection.
- Note that if you will be using Laptop Mode without a card reader, you will be prompted to enter your ConCERTO LOGON User Name to gain access to Laptop Mode.

Saving ConCERTO LOGON data to your laptop should be the last thing you do before you leave your headquarters. This is because, for security reasons, whenever your laptop is linked to the network at your headquarters and you save data to the server, the ConCERTO LOGON program will always prompt you to delete ConCERTO LOGON data which is stored locally on your laptop (unless server data is always automatically saved to laptops, as described above, in which case you will not be prompted to delete ConCERTO LOGON data from your laptop).

### 6.2.1 Logon to Laptop Mode

When you are on the road with your laptop, logon to ConCERTO LOGON Laptop Mode by selecting the "... Laptop Mode..." option as the "Data Source". Your Laptop Mode data will be displayed in the ConCERTO LOGON program. If this option is not displayed, go to Start > All Programs > ConCERTO LOGON Manager > Card and Reader Configuration to add this operating mode option.

To save ConCERTO LOGON data to laptop when you are in Laptop Mode:

- Click on "File" in the menu bar, and click on the "Save to Laptop" selection, or
- Click on the Save short-cut button at the top of the ConCERTO LOGON screen.

## 6.2.2 Loading Laptop Mode Data Back to Secure Server

When you return to your headquarters and link your laptop to the network, logon to the ConCERTO LOGON program by selecting the "... Laptop Mode..." option as the "Data Source".

When the ConCERTO LOGON program detects Laptop Mode data on the computer, it will ask if you want to access Laptop Mode data on this computer, or Secure Server data.

- If you want to save your Laptop Mode data back to the server: Click on the This Computer button. Your Laptop Mode data will be displayed in the ConCERTO LOGON program. To save to the server, click on the "File" option in the menu bar, and click on the "Save to Server" selection. Your data will be saved to the server.
- If you do not need to save any changes which you made in your Laptop Mode data back to the secure server: Click on the Secure Server button. Your server data will be displayed in the ConCERTO LOGON program. Note that the next time that you save data to the server; you will be prompted to delete any data that was saved locally in Laptop Mode. This is for security reasons, to help to ensure that the ConCERTO LOGON data is always stored as securely as possible.

## 6.3 Minimize to System Tray

Instead of exiting the ConCERTO LOGON program after you use it, you can store it in your system tray in the bottom right corner of your screen, so that it is readily available to assist with the next logon.

To minimize the ConCERTO LOGON program to the system tray:

- Click on "File" in the menu bar, and click on the "Minimize to System Tray" selection, or
- Click on the standard Microsoft minimize ("\_") button in the top right corner of the ConCERTO LOGON screen.

When you minimize ConCERTO LOGON to the system tray, the ConCERTO LOGON program will no longer appear on your screen. When ConCERTO LOGON is held in your system tray, you will see the ConCERTO LOGON icon in the bottom right corner of your screen.

Note: If you added or changed any ConCERTO LOGON data, it is recommended that you save data before you minimize the ConCERTO LOGON program. This will ensure that your new data is not lost in case your system fails while ConCERTO LOGON is held in the system tray.

To access the ConCERTO LOGON in your system tray: Double-click on the ConCERTO LOGON icon, in the bottom right corner of your screen and the ConCERTO LOGON program will pop up again. Or right-click on the ConCERTO LOGON icon and make a selection from the menu which appears to short-cut directly to a program screen.

If your installation requires, you may also be prompted to enter your ConCERTO card PIN, to open the program. See description of "General Settings" in the Settings Menu section, for more information on the PIN verification timeout setting.

## 6.4 Lock with Screen Saver

Instead of exiting the ConCERTO LOGON program when you walk away from your desk, you can lock your workstation with the standard Microsoft secure screen saver, via the ConCERTO LOGON program.

To lock your workstation with the secure screen saver:

- Click on "File" in the menu bar, and click on the "Lock with Screen Saver" selection, or
- Click on the Lock short-cut button at the top of the ConCERTO LOGON screen.

You must have already set up your workstation to use the Microsoft standard secure screen saver, in order to initiate the screen saver from the ConCERTO LOGON program.

To setup the secure screen saver: Click on the "Start" menu, in the bottom left corner of your screen. Click on "Settings" and then "Control Panel". In the control panel, double-click on the "Display" icon. Click on the Screen Saver tab, and click on the "Password protected" option, so that a check appears in the check box.

If you are using Windows 98, or if you are using Windows NT, 2000, XP, or Vista but you are not using the card to execute Windows logon, click on the Change button, to designate a screen saver password. You will then be prompted to enter this password to unlock the screen saver.

If you are using Windows NT, 2000, XP, or Vista and are using the card to execute Windows logon, you will be prompted to insert your contact card into the contact card reader (or pass contactless card over reader) and enter your card PIN to unlock the screen saver. When ConCERTO LOGON is used with a fingerprint reader containing a SIM sized contact chip card, the fingerprint authentication replaces, or is used in addition to, PIN entry.

Note: If you added or changed any ConCERTO LOGON data, it is recommended that you save data before you click on the Lock button. This will ensure that your new data is not lost in case your system fails while your workstation is locked with the screen saver.

## 6.5 Exit

To exit the ConCERTO LOGON program:

- Click on "File" in the menu bar, and click on the "Exit" selection, or
- Click on the standard Microsoft exit ("X") button in the top right corner of the ConCERTO LOGON screen.

If you added or changed ConCERTO LOGON data, you will be asked if you want to save changes. If you want to save changes, click on the Yes button.

## 7 Settings Menu

Click on "Settings" in the menu bar, to access the following:

- **Logon to Windows** - Specify if card will be used to logon to network; and if so, enter Windows / network logon information.
- **General** - Choose general preferences, such as if you want ConCERTO LOGON to automatically start when you power-up your computer or if you want to enable the Auto-Recorder feature.

ConCERTO LOGON Settings are described in detail, below.

### 7.1 Logon to Windows

Once you have setup card-enabled logon to Windows, you will be prompted to present your card and enter your card PIN to accomplish Windows authentication in the following scenarios:

- Logon to Windows with card at startup.
- Unlock screen saver with card.
- Unlock workstation with card.

Each scenario is described individually later in this section.

In the Logon to Windows Settings window, PC/SC compatible card reader users have an additional option, to control the Windows session by pulling the card from the reader:

- Lock workstation with pull card action.
- Logoff workstation with pull card action.
- Shutdown workstation with pull card action.

These scenarios are described individually at the end of the section.

#### Note for Windows Vista administrators:

If you are using Windows Vista, you must be logged on as an administrator in order to change the Windows logon setting, and you must either start ConCERTO LOGON in elevated mode (right click on program to "Run as Administrator") or ensure that User Account Control (UAC) under Control Panel > User Account is unchecked.

\* \* \*

To setup card-enabled logon to Windows 2000, 2003, XP, or Vista: Click on "Settings" in the menu bar and click on the "Logon to Windows" selection.

Click on the box in front of "Use card to logon to Windows XP, Vista, 2000, 2003" if you want to use your card to logon to Windows. In order to use this option, you must also enter the user name, password, and domain (optional) which you use to logon to the Windows network. If you do not know this information, refer to your network administrator.

Once you have clicked on this box, the "Select / change logon to Windows entry" option will change in color from gray to black, indicating that the option is available.

To enter your logon to Windows settings:

1. Click on the New button. The Enter Logon to Windows Information window will appear.

2. Enter an entry name which you will recognize this entry by, for example "Accounting" or "Development". This entry will appear in the Select Logon to Windows Entry window the next time you logon.

Enter the user name, password, and domain name that you use to log on to the specified location. Enter the password twice, to ensure correct entry. (The "Current Password" field will not be available for entry upon first use.)

Click on the box to the left of "Prompt to change password every specified number of days" if you want to be prompted to change your password for this entry. Click on the selection box to the right of the option to specify the number of days between prompts. If this has been preset by your system administrator, you will not be able to change this setting.

#### Regarding Windows password changes:

- Note that whenever you change your Windows password in ConCERTO LOGON, the change will be synchronized with your Windows installation - so you do not have to additionally change the password in Windows.
- Also, if at start-up, your computer informs you that your Windows password has expired and prompts you to change your Windows password: when you change the password in Windows as prompted, the change will be synchronized with ConCERTO LOGON - so you do not have to additionally change the password in ConCERTO LOGON.
- Note that any other time you change your password in Windows, other than described above, the change will not be synchronized with ConCERTO LOGON.

The Storage location tab shows if the entry is stored on the card or locally on your computer, or on the server. If your card is a data carrying card and your installation uses a server, you can choose to specify which entries will be stored on the card and which will be stored on the server. If this has been preset by your system administrator, you will not be able to change this setting.

The Permissions tab shows what permissions the cardholder has to view, edit, or delete the entry. Permissions are preset for each installation and cannot be changed by the cardholder.

If "Entry is mirrored on server" is checked, this indicates that your installation mirrors all logon data on the server, so that if cards are lost the logon data can be efficiently recovered. If "Entry managed by administrator" is checked, this indicates that the entry is managed by an administrator. In this case, the degree to which you can change the entry will be dictated by the administrator.

Click on the OK button, when you have completed entry for this window.

3. You will be returned to the Logon to Windows Settings window, and your new entry will be displayed.
4. Select an additional Card Control option. When card is removed from reader:
  - Logoff user: removing card from reader logs off user.
  - Lock system: removing card from reader locks system.
  - Shutdown system: removing card from reader shuts down computer.
  - Custom action: removing card from reader starts a custom action.
  - No action: user can remove card from reader at any time and no action will be taken.

Click on selection box to select desired option.

Click on selection box to define countdown time before action is taken, if your installation allows you to change this setting.

5. Click on the OK button, to continue.

The New Setting window will be displayed, informing you that the "New setting will be activated after system reboot". Click on the OK button. You will be returned to the Logon entries screen.

6. "Do you want to save data now?", will appear. Click on the Yes button, to save.

\* \* \*

**Note:** If you are using this option and you want to un-install ConCERTO LOGON from your computer, you should perform the following procedures before un-installing ConCERTO LOGON:

1. Un-check the "Use card to logon to Windows" box.
2. Click on OK button.
3. Exit ConCERTO LOGON Manager.
4. Reboot computer.

Start un-install process from your Windows "Start" option in the lower left corner of your screen, via the "Settings" then "Control Panel" then "Add/Remove Programs" options.

## 7.1.1 Logon to Windows with Card at Startup

Once you have set up your card to logon to Windows / networks, the next time that you reboot your computer and logon to Windows ConCERTO LOGON will accomplish the logon transparently. You will only have to enter your ConCERTO LOGON card PIN, for card authentication.

Be aware that after logon to Windows settings have been changed and saved, you must reboot your computer in order to activate the card enabled logon capability.

When ConCERTO LOGON is used with a fingerprint reader containing a SIM sized contact chip card, the fingerprint authentication replaces, or is used in addition to, PIN entry.

Cardholders who do not have "Administrator" rights to their computer: if you have saved your Windows logon information in ConCERTO LOGON but you are not offered card enabled logon to Windows the next time that you reboot, please refer to your Administrator for assistance.

To logon to Windows with your card at startup:

1. Power up your computer. A ConCERTO LOGON window will prompt "Logon to Windows with ConCERTO LOGON Manager?". Click on OK button.  
You will then be prompted to insert your contact card into your contact card reader (or pass contactless card over reader) and type in your ConCERTO LOGON card PIN. Click on OK button to continue.

The ConCERTO LOGON Logon to Windows window will appear.

2. If you have more than one Windows Entry (different Windows logon locations), click on the "down arrow", to select an entry. Click on the OK button, when entry for this window is complete.

Click on the OK button, when entry for this window is complete, and logon to Windows will be accomplished.

## 7.1.2 Unlock Screen Saver with Card

If you use a Windows secure screen saver to protect your workstation after you have left it untouched for a defined period of time - and you have set up your card to logon to Windows / network - you will be prompted to insert your contact card into your contact card reader (or pass contactless card over reader) and enter your ConCERTO LOGON card PIN, to unlock your screen saver.

See also "Lock with Screen Saver" selection under "File" option, to initiate the secure screen saver from ConCERTO LOGON.

Note however, that if you have set up your card to logon on to Windows but instead you logon to Windows manually, you will also be prompted to unlock the screen saver manually.

To unlock your screen saver with your card:

1. Strike a key on your keyboard. The ConCERTO LOGON Windows / Network Logon window will appear after a delay of 5-10 seconds.
2. Enter your ConCERTO LOGON card PIN and pass contactless card over reader as prompted.

Click on the OK button, and the screen saver will be unlocked. Or, click on the Cancel button to enter your logon to Windows information manually, if your installation allows.

## 7.1.3 Unlock Workstation with Card

If you lock your workstation using the Windows command - and you have set up your card to logon to Windows / network, as described above - you will be prompted to insert your contact card into your contact card reader (or pass contactless card over reader) and enter your card PIN, to unlock your workstation.

Note however, that if you have set up your card to logon on to Windows but instead you logon to Windows manually, you will also be prompted to unlock the workstation manually.

To unlock your workstation with your card:

1. Enter your card PIN and pass contactless card over reader as prompted.

Click on the OK button, when entry for this window is complete, and the workstation will be unlocked. Or, click on the Cancel button to enter your logon to Windows information manually, if your installation allows.

## 7.1.4 Lock Workstation with Pull Card Action

If you selected the "Lock system" option in the Logon to Windows Settings window under Card Control, each time you pull your card from your card reader your workstation will be locked using the Windows lock process. (For PC/SC compatible readers only.)

Note that on some systems when the Windows environment is busy processing something else, the system may not respond immediately. If this happens, wait until Windows has finished processing.

To lock workstation with pull card action:

1. Pull your card from your card reader.
2. The Countdown window will be displayed, informing you how many seconds are left before the workstation will be locked.

If you do not return your card to the card reader, the workstation will be locked.

If you return your card to the card reader, the workstation will not be locked.

## **7.1.5 Logoff Workstation with Pull Card Action**

If you selected the "Logoff user" option in the Logon to Windows Settings window under Card Control, each time you pull your card from your card reader you will be logged off of your workstation. (For PC/SC compatible readers only.)

Note that on some systems when the Windows environment is busy processing something else, the system may not respond immediately. If this happens, wait until Windows has finished processing.

To logoff workstation with pull card action:

1. Pull your card from your card reader.
2. The Countdown window will be displayed, informing you how many seconds are left before you will be logged off of the workstation.

If you do not return your card to the card reader, you will be logged off of the workstation. If you return your card to the card reader, you will not be logged off of the workstation.

## **7.1.6 Shutdown Workstation with Pull Card Action**

If you selected the "Shutdown system" option in the Logon to Windows Settings window under Card Control, each time you pull your card from your card reader your workstation will shutdown. (For PC/SC compatible readers only.)

Note that on some systems when the Windows environment is busy processing something else, the system may not respond immediately. If this happens, wait until Windows has finished processing.

To shutdown workstation with pull card action:

1. Pull your card from your card reader.
2. The Countdown window will be displayed, informing you how many seconds are left before the workstation is shutdown.

If you do not return your card to the card reader, the workstation will be shutdown. If you return your card to the card reader, the workstation will not be shutdown.

## **7.1.7 Start Custom Action with Pull Card Action**

If you selected the "Custom action" option in the Logon to Windows Settings window under Card Control, and your Administrator has defined a custom action, each time you pull your card from your card reader a custom action will be launched (For PC/SC compatible readers only). Custom actions may include for example a Terminal Services pull card action, or the launch of a custom script. Whichever action was specified by your Administrator will occur.

Note that on some systems when the Windows environment is busy processing something else, the system may not

respond immediately. If this happens, wait until Windows has finished processing.

To start custom action with pull card action:

1. Pull your card from your card reader.
2. The Countdown window will be displayed, informing you how many seconds are left before the custom action starts.

If you do not return your card to the card reader, the custom action will start. If you return your card to the card reader, the custom action will not start.

## 7.1.8 Recovering from ConCERTO LOGON Logon to Windows Boot Failure

If you need to recover from ConCERTO LOGON (OdGina.dll) boot failure, for example, if you accidentally uninstall part of the ConCERTO LOGON files, have a hard disk failure, or have a virus.

1. Boot Windows in Safe Mode as follows:

To get into the Windows 2000 / XP / Vista Safe mode, as the computer is booting press and hold your "F8 Key" which should bring up the "Windows Advanced Options Menu". Use your arrow keys to move to "Safe Mode" and press your Enter key.

2. Deactivate ConCERTO LOGON OdGina.dll boot module as follows:

a) Go to Start > Run and paste the following command into the open command field (including the quotation marks):  
"c:\program files\ConCERTO LOGON logon manager\ResetCardLogon.exe"

then click on "ok" to run the utility and the click on "Yes" to delete the ConCERTO LOGON OdGina.dll registry entry.

b) If ConCERTO LOGON Manager has been partially uninstalled and the above command cannot be run, you can instead deactivate the ConCERTO LOGON OdGina.dll by deleting the following string value in the Windows Registry:  
"HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Windows NT\CurrentVersion\Winlogon\GinaDLL".  
Before deleting this value, ensure that it was set to "odgina.dll". If it is pointing to any other component, it was not created by ConCERTO LOGON.

3.) Reboot and logon to Windows manually, then un-install and re-install ConCERTO LOGON Manager.

## 7.2 General Settings

To access General settings please click on "Settings" in the menu bar and click on the "General" selection.

General settings options are described individually, below. When you have completed entry for this window, click on the OK button.

### 7.2.1 Startup Control

#### Automatically start ConCERTO LOGON after power up

Click on this option if you want the ConCERTO LOGON program to automatically start after power up. When a check appears in this box, the ConCERTO LOGON program will be automatically opened and will appear on your screen, each time you power up your computer.

If you are using your card to logon to a Windows network, be aware that this box can be left unchecked and it will have

no effect on your network logon procedure. ConCERTO LOGON will still log you on to the network in the background, and will only appear to request your card PIN.

## **Minimize to system tray after power up**

If you clicked on the previous option, so that a check is shown in the "Automatically start ConCERTO LOGON after power up" check-box, the "Minimize to system try after power up" option will change in color from gray to black, indicating that the option is available.

Click on this option, if you want the ConCERTO LOGON program to immediately minimize to the system tray after power-up. This option ensures that the ConCERTO LOGON program is close at hand whenever you need to use ConCERTO LOGON data to logon to a website or application.

See "Minimize to System Tray" for more information on this topic.

## **7.2.2 Fill Control**

### **Enable Auto-Recorder for website logons / Enable Auto-Recorder for Windows application logons**

Click on this option if you want the Auto-Recorder window to be displayed every time you go to a website or Windows application logon location which the ConCERTO LOGON recognizes as being recordable. When the Auto-Recorder window appears, you can choose to record the logon entry by clicking on the Yes or OK button, or Cancel.

ConCERTO LOGON typically recognizes the following types of logon locations as being recordable:

- Logon locations containing a password field that can be recognized by other applications.

The Auto-Recorder will be displayed in the following cases:

- For recordable locations that are not currently stored in the ConCERTO LOGON program as recorded entries.
- For recordable locations that are stored in ConCERTO LOGON program, but for which the Auto-Fill feature is not active. This enables cardholders to easily re-record logon entry information, for example, if cardholder wants to enter different information, or if the logon location has changed and entry needs to be re-recorded.

### **Enable Auto-Fill**

Click on this option if you want to have the option to use the Auto-Fill feature for entries which have been recorded by ConCERTO LOGON (with Auto-Recorder of Record option).

When this option is active, the Auto-Fill option will be available in the Logon Information window for logon entries which have been recorded by ConCERTO LOGON.

If you switch this option off and you have already designated Auto-Fill for individual logon entries, these entries will revert to button-click fill while Auto-Fill is switched off.

### **Enable Pop-up feature**

Click on this option if you want the ConCERTO LOGON program to automatically pop up whenever you go to a specified pop-up location for which Auto-Fill is not activated (if Auto-Fill is active, pop-up feature will not apply). When a check is shown in this check-box, the pop-up option will be selectable in the Logon Information window, when you enter or change logon information. Pop-up will not be selectable for manually entered logon entries.

The pop-up feature is provided as an optional feature which can be clicked on and off, because while some ConCERTO LOGON users may rely on the convenience of the pop-up feature, others may never use the pop-up feature.

For example, if you typically double-click on a website or application name in the Logon entries screen selection list to

go directly to a specified logon location (see previous section, Logon to a Website or Application), you do not need to specify a pop-up location because the ConCERTO LOGON will already be displayed on the screen.

## 7.2.3 PIN Control

### **PIN verification timeout**

If you want the ConCERTO LOGON program to prompt you to enter your ConCERTO LOGON card PIN each time that you do a security-related function, enter a "0" in the timeout box. You will then be prompted to enter your PIN each time you do one of the following tasks: viewing passwords and "Private" information in the clear, maximizing ConCERTO LOGON program from system tray, reading or saving data with the card.

Note also that if your timeout is set to "0" and your ConCERTO LOGON is minimized in your system tray, you will be prompted to enter your PIN twice in order to perform any function (ie, to open from system tray, and to enter logon information from ConCERTO LOGON into a logon location). In this case, you may consider specifying a timeout such as "5", so that double entry is not required.

If you want to specify a time period between PIN verification prompts, enter it (in seconds) in the timeout box. You will then only be prompted to enter your PIN when the PIN verification period times out. Requiring frequent PIN entry provides you with more security, for example, in case you leave the program open in your system tray and walk away from your workstation.

If you are in an environment where no one else would have access to your workstation; or, if you lock your workstation when you walk away; or, if you exit the ConCERTO LOGON program whenever you leave your workstation, you may have different PIN verification timeout needs.

If your ConCERTO LOGON installation is pre-configured to always require PIN verification, you will not be able to change this setting. Likewise, some installations may require PIN entry all the time for certain functions - for example, to delete an entry or to view a "Private" field - in which case, you will not be allowed to change this behavior.

Note for "Hibernate" or "Standby" feature users: It is recommended that the PIN verification timeout be set to at least 10 seconds. This allows the workstation enough time to connect with the card services upon activation/deactivation.

## 8 Utilities Menu

Click on "Utilities" in the menu bar, to access the following:

- **Record:** record a logon entry.
- **Change PIN:** change card PIN.
- **Change PUK:** change card PUK.
- **Backup/Restore:** backup ConCERTO LOGON data / restore ConCERTO LOGON data.
- **Clean Card:** delete Windows, Logon, Address, or Payment entries.
- **Online Update:** go online, to update your ConCERTO LOGON software.
- **Online Admin:** go to online administrative functions (if applicable).
- **Netscape:** toggle Netscape option on, if you are working with Netscape.

ConCERTO LOGON utilities are described below.

### 8.1 Record

Click on "Utilities" in the menu bar, and click on the "Record" selection, to start recording a logon entry.

Note that you can also use the Record short-cut button at the top of the main ConCERTO LOGON screen to start recording a logon entry, as described in the Enter Logon Information section.

### 8.2 Edit 'Do Not Record' List

Click on "Utilities" in the menu bar, and click on the "Edit 'Do Not Record' List" selection, to edit the list of websites for which the auto-record feature has been blocked.

Lines will be added to this list when you check the 'Do not ask again to save this website' checkbox during an auto-record prompt. Whenever a website address contains the specified text string, auto-record will not be activated.

You can edit a text string as required and save the entry. For example, to make an address string more general, delete any characters that appear before "www." or after ".com". If you never want auto-record to prompt at any location at a website, for example the "www.mycompany.com" website, you can specify simply "mycompany" as the text string.

If you would like to re-enable auto-recording for specific websites, you must delete the respective entries from the list.

### 8.3 Change PIN

Click on "Utilities" in the menu bar, and click on the "Change PIN" selection, to change your card PIN.

The Change PIN window will appear.

To change your card PIN:

1. Enter your current PIN, and then enter your new PIN twice, to ensure correct entry. If your installation has a PIN Policy, your PIN selection will be governed by this policy.
2. Click on the OK button, to complete entry for this window.

Note: If you choose to write your card PIN down, you must store this information in a secure place, so that the

security of your data is not compromised.

Important note for cardholders who do not have a ConCERTO LOGON system administrator: If you have a ConCERTO LOGON Standalone version, you have sole responsibility for your ConCERTO LOGON PIN and you must be very careful not to lose your ConCERTO LOGON PIN. Because of the sensitive nature of the information which is stored on the card, it would be a breach of security for the manufacturer to reset your card PIN so that you could choose a new PIN.

## 8.4 Change PUK

Click on "Utilities" in the menu bar, and click on the "Change PUK" selection, to change your card PUK (Personal Unlock Key), if your installation has enabled this capability.

A PUK is a second card PIN, which the cardholder can use to unlock their card. A card will be locked and no longer accepted within the ConCERTO LOGON system if the cardholder enters the wrong PIN multiple times. Once a card has been locked, ConCERTO LOGON will prompt the cardholder to enter the PUK to unlock the card. After the PUK has been entered successfully, the cardholder will be informed that the PIN has been reset to the program default PIN of "12345". Cardholder should then immediately change the default PIN to a unique PIN, to ensure the security of his ConCERTO LOGON data.

If cardholder does not know his PUK and enters the wrong PUK multiple times, he will be denied further access to ConCERTO LOGON and must refer to the system administrator to get a new card.

To change your card PUK:

1. Enter your current PUK, and then enter your new PUK twice, to ensure correct entry. If your installation has a PIN/PUK Policy, your PUK selection will be governed by this policy.
2. Click on the OK button, to complete entry for this window.

Note: If you choose to write your card PUK down, you must store this information in a secure place, so that the security of your data is not compromised.

Important note for cardholders who do not have a ConCERTO LOGON system administrator: If you bought a ConCERTO LOGON Standalone version, you have sole responsibility for your ConCERTO LOGON PUK and you must be very careful not to lose your ConCERTO LOGON PUK. Because of the sensitive nature of the information which is stored on the card, it would be a breach of security for the manufacturer to reset your card PUK so that you could choose a new PUK.

## 8.5 Backup/Restore

Click on "Utilities" in the menu bar, and click on the "Backup/Restore" selection, to backup data; or to restore backed up data. You can also specify Auto-Backup settings, so that you will be prompted when it is time to perform a backup.

Frequent backup of your ConCERTO LOGON data is recommended if you are using a card to store your ConCERTO LOGON data. Your card could be lost or stolen, for example.

For Enterprise versions that use non-data storing contactless cards, since the data is stored on a secure server, backups are optional. You may wish to make a backup, for example, if you want to save a copy of your data at a certain point in time.

For Standalone versions that use non-data storing contactless cards, data should be frequently backed up, so that if your local computer malfunctions you will still have a copy of your ConCERTO LOGON data.

Note that when you backup your ConCERTO LOGON information, you will be prompted to enter a backup password. It is important that you use a password that you can remember, so that if you lose your card or if your card is damaged, you will be able to access the backup information with the password and load it to a new card. If you choose to write this backup password down, you must store this information in a secure place, so that the security of your data is not compromised.

When you perform a backup, ConCERTO LOGON backs up your Windows network logon information, and all of your ConCERTO LOGON website / application logon entries and personal information.

Note that the Default location file name includes information which helps you define the backup: "Backup", your card identification number, the date of the backup, and ".spx" to show that it is a ConCERTO LOGON file; for example: BackupCH1234567890123456\_05042001.spx. You may want to make a note of your card number, especially if you share a computer with others, so that you are able to identify your backup when you need to restore data to your card. Or, if you are specifying a preferred location for backup, you can choose a different name. Otherwise, the file name will always revert to the default name.

Use your best judgment to determine which storage location you should choose: Default location or preferred location. Each location has its own advantages:

- **Default location:** The ConCERTO LOGON backup default path is C:\Documents and Settings\All Users\Application Data\ConCERTO LOGON\ConCERTO LOGON Manager\Backups. The advantage of using the default path is that you will always remember where your ConCERTO LOGON backup file is. Be aware however, that if your computer fails and data files are affected, you may stand the risk of losing your ConCERTO LOGON backup data. Also, although the ConCERTO LOGON backup file is encrypted, it could still be copied from your computer. If a hacker had enough time and energy and had the file on his own turf, there is a chance that he could eventually decipher your information.
- **Preferred location:** This is typically the best choice for most installations, since you can specify a safe storage location for your backup, for example on an external device that can be stored in a secure place, or on a secure server.

Any of the above settings may have been pre-set by your program administrator, for example, to direct backups to a secure network location.

The Manual Backup, Auto-Backup setup and Restore procedures are described in greater detail, below.

## 8.5.1 Manual Backup

Click on "Utilities" in the menu bar and click on the "Backup/Restore" selection, to perform manual backup of card data.

1. Choose your preferred backup storage location by clicking on one of the two choices: Default location or preferred location. Provide any additional information which is required, for example, for the file path. Refer to the preceding discussion, for help with determining which method you would like to use.
2. Specify a file name for the backup, or use the default file name which is provided.
3. Click on the Backup button, to execute backup.

4. You will be prompted to enter a Backup password twice, and backup will be executed.

Alternately, you can choose to specify that your current PIN should be used as the backup password by selecting the "Use PIN as backup / restore password" option. If you select this option, you must enter your card PIN to restore the backup file. Note that if you change your card PIN, it is recommended that you make a new backup to correspond to the new PIN.

## 8.5.2 Auto-Backup

Click on "Utilities" in the menu bar and click on the "Backup/Restore" selection, to setup Auto-Backup.

Auto-Backup will prompt you when it is time to perform a backup, according to the options which you specify.

1. Click on the check-box to the left of "Perform Auto-Backup as specified below." to activate Auto-Backup.
2. Choose your preferred backup storage location by clicking on one of the two choices: Default location or Preferred location. Provide any additional information which is required, for example, for the file path. Refer to the preceding discussion, for help with determining which method you would like to use.
3. For consistency, Auto-Backup will always revert to the default file name which is provided.
4. Specify how often you want to be prompted to perform Auto-Backup.

Initiate Auto-Backup every specified number of days. Select this option if you want to specify the number of days between Auto-Backup prompts. Click on selection box to specify number of days.

Initiate Auto-Backup after data has been saved to card specified number of times. Select this option if you want to specify the number of times you have saved to card between Auto-Backup prompts. Click on selection box to specify number of times.

5. Click on the OK button to save Auto-Backup settings.

Depending on your setup, an Auto-Backup window will prompt you to enter a backup password to initiate Auto-Backup as scheduled. Backup data will be saved as specified in the Auto-Backup setup window.

Note: The Auto-Backup performs checks on a 1 minute loop timer, to see if any Auto-Backup prompts are due. For example, even if you specify that Auto-Backup prompts should come after each time that you save to card, you will still have a 1 minute delay.

## 8.5.3 Restore Data

Click on "Utilities" in the menu bar, click on the "Backup/Restore" selection, then the "Restore" tab, to restore backed up card data to your card.

Note that when you restore a backup file, any data which is currently held on your card (or in your ConCERTO LOGON program files on the secure server, in the case of non-data storing contactless cards) will be overwritten.

In order to restore data, you will be prompted to enter your backup password.

To restore data:

1. Specify the name of the backup file which holds the data which you want to restore. If the file is listed in the data box, you can click on the "down arrow" to select it from the list.

2. Choose the file location you want to restore from by clicking on one of the two choices: Default location or Preferred location. Provide any additional information which is required, for example, for the file path. Select the File Name.
3. Click on the Restore button.
4. You will be prompted to enter your Backup password. Enter the Backup password which you specified when you backed up the data.

The data will be restored to your card (or to your ConCERTO LOGON account on the secure server, in the case of non-data storing contactless cards).

## 8.6 Load Logon Entries

Using this feature, you can share pre-configured logon entries with other ConCERTO LOGON users. This function is especially helpful for example for logon entries that are difficult to record. An Administrator can prepare the logon entry or entries, delete the user name and password, and save the entry to a backup file using the standard backup functionality. Then, end-users can load the entries to their cards or ConCERTO LOGON accounts, simply adding their user name and password and saving the entry.

When end-users load the logon entries using this option, the entries will be added to the existing logon entries on the end-user's card or ConCERTO LOGON account. (I.e., do not load these types of entries using the Restore function, which will cause the contents of the card or ConCERTO LOGON account to be overwritten.)

Administrators who want to use this feature are recommended to use a blank card to create these types of logon entries. This is because the standard ConCERTO LOGON Backup feature is used to save the logon entry, which automatically backs up all entries on a card or ConCERTO LOGON account to a single backup file.

After software has been installed, you will also find some pre-configured logon entries under C:\Documents and Settings\AllUsers\ApplicationData\ConCERTO LOGON\ConCERTO LOGON Manager\Backups

These represent a few common logon entries that can be difficult to record due to their complexity that can be loaded to your card as described above.

Note also that if you have an important logon entry that you are having difficulty recording, please contact your ConCERTO LOGON reseller.

## 8.7 Print Backup

If this option is offered in your installation: To print out a hard-copy listing of all logon, address, and payment entries that are currently stored with the card, click on "Utilities" in the menu bar and click on the "Print Backup" selection.

This printed backup should only be stored in a secure location, for example a locked safe where other sensitive documents are stored. This option is provided at some installations for backup purposes only, and is not intended for daily use.

Warning: If you decide to print out this document, you must ensure that - from the print process to storage in a secure location - the document is never left unsecured where other individuals may gain access to it.

## 8.8 Clean Card

To clean card, click on "Utilities" in the menu bar and click on the "Clean Card" selection.

The Clean Card utility enables you to "clean" entry data from your card. This option is generally most helpful for example, for employees who are leaving a company, and want to "clean" their data-storing card, or erase all of their ConCERTO LOGON data in the secure server (in the case of non-data storing contactless cards).

You can choose to erase just one category of entries, or all category entries.

Use this utility with caution, since once these entries have been deleted, they cannot be recovered!

To Clean Card:

1. Click on the check-box next to an entry category from which you want to delete all of the entries: Windows, Logon, Address, or Payment.
2. Click on the OK button, to delete entries.

When you click on the OK button, all specified entries will be deleted. Once this information has been deleted, it cannot be recovered unless you made a previous backup of the information.

## 8.9 Online Update

Click on "Utilities" in the menu bar, and click on the "Online Update" selection, to check for ConCERTO LOGON program updates, if your installation has this feature is enabled. At the update site, you will be instructed on how to proceed further.

## 8.10 Online Admin

Click on "Options" in the menu bar, and click on the "Online Admin" selection, if your installation has this feature enabled.

This option provides a link to online administrative functions, for online reporting or integrated online administrative functions for multi-functional card solutions. Note that the amount of information which you will be able to view at the administrative site will be determined by the access allowance which was assigned to you upon card issuance.

For example:

- Employees may be able to view a listing of locations on the corporate network which they have access to with their card. Or, if the company uses an electronic purse on the card, employees could view an ad hoc report on their transactions.
- Administrators or managers could view reports on what company files were accessed by which employee. Or, if the company has an integrated card solution with a building access solution, managers could create an ad hoc report to see which employees accessed which corporate areas with their card, and when.

## 8.11 Mozilla Firefox

Click on "Utilities" in the menu bar, and click on the "Mozilla Firefox" selection, if your installation has this feature enabled. This will toggle the Mozilla Firefox capability to "on", so that you can use the ConCERTO LOGON Logon Manager with Mozilla Firefox. Follow the instructions on the screen to launch the Mozilla extension installer.

(Standard version of ConCERTO LOGON is setup to work with Internet Explorer as a default.)

## 9 Help Menu

Click on "Help" in the menu bar, for ConCERTO LOGON program Help.

### 9.1 Help for Current Screen

Click on "Help" in the menu bar, then the "Help for Current Screen" selection, for Help information for the screen which you are currently in.

Help information is provided for each item on the screen, in the order in which the item appears.

Click on the Online FAQ button, to go online to view Frequently Asked Questions for this screen.

For assistance when you are in a ConCERTO LOGON program window, click on the "i" icon at the bottom left of the window. Help information will be provided for each item in the window, in the order in which the item appears.

### 9.2 Support

Click on "Help" in the menu bar, then on the "Support" selection, for information about ConCERTO LOGON support.

If you have a problem or question which is not included in the Help or FAQ information, or if you have forgotten your PIN or have a problem with your card: please contact your ConCERTO LOGON program administrator or call the Help Desk line (if you have been assigned one).

If you do not have an administrator (for example, for individual installations), go online to [support.scmmicro.com/ConCERTO](http://support.scmmicro.com/ConCERTO) for additional support information.

### 9.3 Session Info

Click on "Help" in the menu bar, then on the "Session Info" selection, for information about the current ConCERTO session, including the mode of the current session, your card ID number, and your ConCERTO User Name.

### 9.4 About

Click on "Help-About" in the menu bar for general information about the ConCERTO program.